Compiled by:

Industrial Development Office

City of Saskatoon

NOVEMBER 1984

WAREHOUSE STUDY #6 1983-84

City of Saskatoon

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City of Saskatoon

November 1984

CITY OF SASKATOON

DAVID R. FAIRLIE
INDUSTRIAL DEVELOPMENT MANAGER

The Industrial Development Office has just completed the annual updating of the current warehouse availability situation for the City of Saskatoon.

Research and compilation of the results were conducted by Lynn Shyluk, Co-ordinator of the Industrial Development Office.

As with the five previous studies, this project addresses itself to the warehouse market sector and in particular to those projects commenced between August 1, 1983 and July 31, 1984.

Some of the highlights are as follows:

1. Total new warehouse/warehouse office space added to the market place during the study period was: 34,708 square meters (373,411 square feet).

2. Total space that has been added to inventory between January 1, 1978 and July 31, 1984 is 346,773 square meters (3,730,722 square feet).

3. Absorption Rate for the study period was approximately 2,764.5 square meters per month (29,740 square feet).

4. Available space as of July 31, 1984 was 1,535.3 square meters (16,517 square feet).

As with previous updates, the data presented does not represent a true picture of the aggregate total warehouse space available within the City. It is only an analysis of those projects for which building permits were issued between August 1, 1983 and July 31, 1984.

In all probability a vacancy rate of approximately 400,000 square feet exists. This would represent a vacancy factor of approximately 2.8%. It is estimated that 13,873,400 square feet of warehouse and warehouse/office space exists in the City of Saskatoon.

I would again extend my thanks and appreciation to the numerous developers, commercial realtors, and the City Building Department for their co-operation and contribution in supplying the necessary information.

David R. Fairlie, Manager
Industrial Development Department

A. METHODOLOGY

The 1984 Warehouse Study (report #6) includes the building permits issued between August 1, 1983, up to and including July 31, 1984.

The information was taken directly from the original building permit applications by the writer. In addition, telephone calls were made to each applicant to obtain the breakdown of warehouse space, office space, self-absorption, leased space, preleased space and available space. All areas have been converted to square meters. To convert from square meters to square feet, multiply the m^2 x 10.7584.

Since there are some conversions from square feet to square meters, the columns may not add up due to rounding.

B. PROJECTS COMING ON STREAM

1983 Completions

Four (4) projects came on stream during November and December 1983, and totalled 2,848.65 m^2.

1984 Completions

The remaining thirty (30) projects had a completion date during 1984 and are broken down as follows:

January 5 projects	= 3,209.59 m^2
February 3 projects	= 2,370.30 m^2
March 2 projects	= 1,211.61 m^2
April 2 projects	= 853.1 m^2
May 2 projects	= 3,433.8 m^2
June 1 project	= 6,967.7 m^2
July 4 projects	= 7,936.4 m^2
August 2 projects	= 1,274.0 m^2
September 7 projects	= 3,575.55 m^2
November 1 project	= 611 m^2
December 1 project	= 372.1 m^2

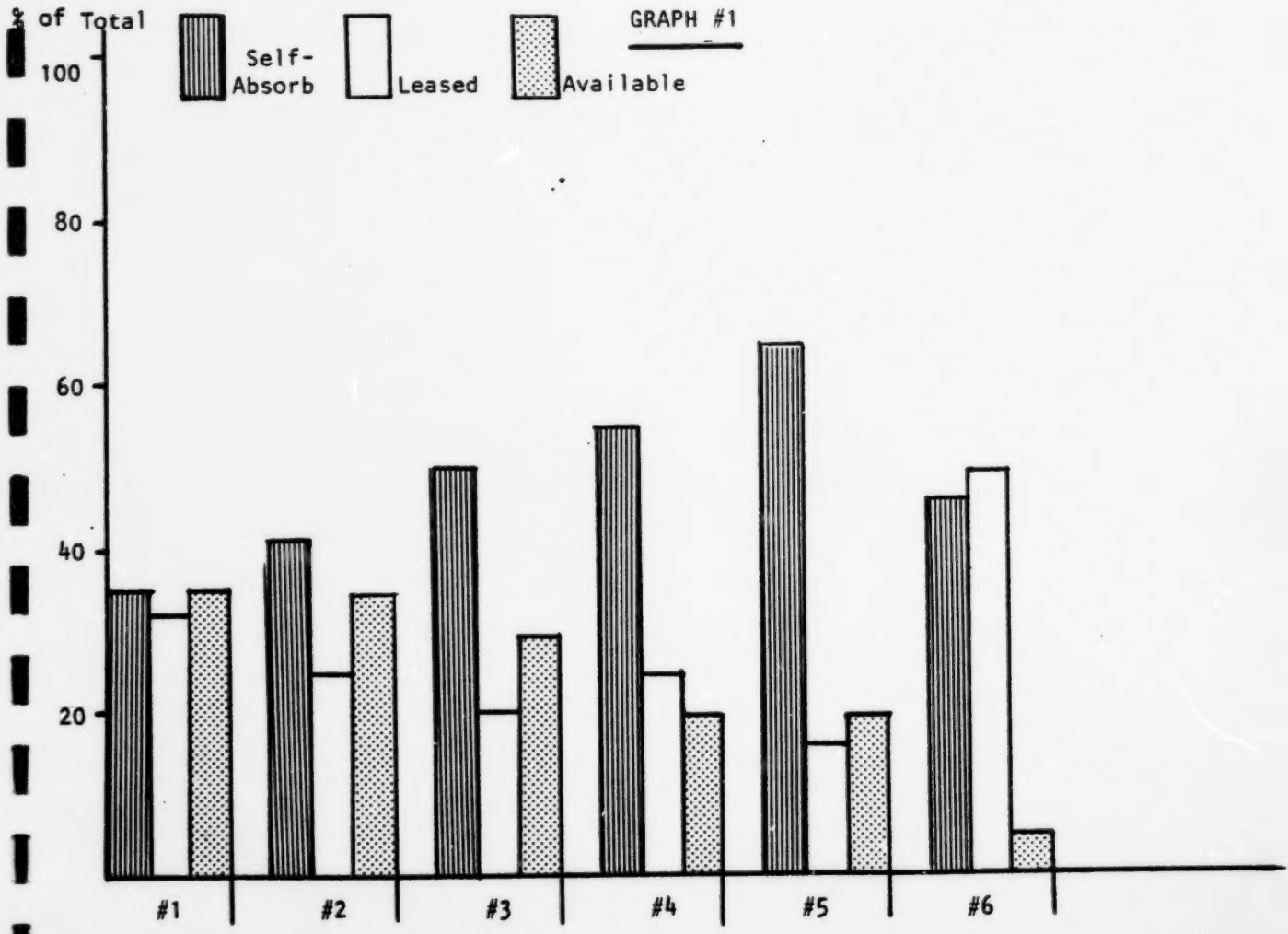
Only three of the thirty-four projects had space available for lease, and only nine were built to lease to clients. The remainder were all built for self-absorption, which is a definite change from the original study initiated 6 years ago.This shift is indicated in Table #1 and the corresponding Graph #1

TABLE #1

	YEAR	SELF-ABSORBED	LEASED	AVAILABLE	TOTAL SQ. FT.
#1	1978-79[1]	389,222	360,118	390,468	1,139,800
#2	1979-80	264,055	147,759	212,509	624,323
#3	1980-81	498,855	206,185	282,482	987,522
#4	1981-82	303,817	134,175	108,175	546,174
#5	1982-83	125,708	30,530	35,100	191,340
#6	1983-84	171,239	185,655	16,517	373,411

[1]. This study period was a two year period as compared to only a 1 year period for the subsequent studies.

GRAPH #1



C SURVEY RESULTS FROM AUGUST 1, 1983 to JULY 31, 1984

1. Total Self-Absorbed warehouse space - 13,726.64m^2 / 147,676 sq. ft.

2. Total Self-Absorbed warehouse/office space - 2,190.13m^2 / 23,564 sq. ft.

3. Total Leased warehouse space - 16,666m^2 / 179,302 sq. ft.

4. Total Leased warehouse/office space - 590.38m^2 / 6,351 sq. ft.

5. Total Available warehouse space - 1,303.4m^2 / 14,022 sq. ft.

6. Total Available warehouse/office space - 231.9m^2 / 2,495 sq. ft.

7. Total Office space constructed - 3,012.4m^2 / 32,408 square feet, which represents 9% of the total space built during this study period. The average office space to warehouse space has always been in the 10% range, and will probably continue in that fashion.

APPENDIX A

FIRM NAME	LOCATION OF PROJECT	PERMIT DATE	TYPE OF PROJECT	WAREHOUSE SIZE m^2	OFFICE SIZE m^2	COMPLETION DATE	ABSORPTION m^2 SELF	LEASED	AVAIL	TOTAL
1983										
1. R & G Mechanical	3203 Wells Ave.	Aug. 12	Whse. add	188.62	-	Nov. 83	188.62	-	-	188.62
2. Beverage Central	2000 Ontario Ave.	Aug. 19	Whse. new	310.89	-	Jan. 84	310.89	-	-	310.89
3. Beverage Central	333 Circle Dr. E.	Aug. 24	Whse. add	2026.41	-	Jan. 84	2026.41	-	-	2026.41
4. Jancy Holdings	410 - 48th St. E.	Aug. 26	Whse. new	697.12	231.9	Dec. 83	-	-	929.03	929.03
5. Precision Auto	2326 Ave. C. North	Aug. 30	Whse. add	97.6	97.6	Jan. 84	195.22	-	-	195.22
6. Mid West Devel.	1622 Ontario Ave.	Sept. 2	Whse. add	593	-	Nov. 83	-	593	-	593
7. Cardinal Electric	210 Cardinal Cres.	Sept. 16	Whse. new	374	187	Feb. 84	561	-	-	561
8. R. Schaan	820 - 45th St. E.	Sept. 20	Whse/Off new	838	300	Dec. 83	1138	-	-	1138
9. B. Divall	633 Ave. N. South	Oct. 3	Whse/Off new	283.3	10	Feb. 84	146.65	146.65	-	293.3
10. G. Karmark	625 Ave. O. South	Oct. 12	Whse. new	371.61	-	March 84	371.61	-	-	371.61
11. Sanitary Supplies	506 Duchess Street	Oct. 13	Whse. new	199.03	199.03	Jan. 84	398.07	-	-	398.07
12. Sask. Govt. Ins.	705 - 43rd St. E.	Oct. 25	Storage Bldg.	279	-	Jan. 84	279	-	-	279
13. L & S Eqpt. Ltd.	4015 Thatcher Ave.	Nov. 2	Whse/Off new	1239	322	Feb. 84	1561	-	-	1561
14. Jancy Holdings	2744 - 1st Ave. North	Dec. 29	Whse/Off new	1673.35	645.5	May 84	2318.8	-	-	2318.8
15. Jancy Holdings	2727 - 1st Ave. North	Dec. 30	Whse. new	847	268	May 84	1115	-	-	1115
16. D. L. Perret	332 Avenue K. South	Dec. 30	Whse. new	840	-	March 84	840	-	-	840
1984										
17. Solar Sales	226 Portage Ave.	Jan. 5	Whse. add	211.1	161	Dec. 84	161	-	211.1	372.1
18. Reliance Lumber	2815 Lorne Ave.	Jan. 23	Whse. new	780	-	April 84	780	-	-	780
19. Liquor Commission	1935 - 1st Ave. North	Feb. 15	Whse. add	73.1	-	April 84	73.1	-	-	73.1
20. Normandale Hldgs.	320-324 Edson Street	Mar. 6	Whse. new	6860.23	107.5	June 84	-	6967.7	-	6967.7
21. Intercontinental	3003 - 11th St. West	Mar. 8	Whse. storage	344.2	-	July 84	344.2	-	-	344.2
22. Intercontinental	3003 - 11th St. West	Mar. 8	Whse. storage	258.2	-	July 84	258.2	-	-	258.2

FIRM NAME	LOCATION OF PROJECT	PERMIT DATE	TYPE OF PROJECT	WAREHOUSE SIZE m^2	OFFICE SIZE m^2	COMPLETION DATE	ABSORPTION M^2 SELF	LEASED	AVAIL	TOTAL
23. Normandale Hldgs.	314-318 Edson Street	March 22	Whse. new	6747	215	July 84	-	6962	-	6962
24. Western Tire	310 - 48th St. E.	April 30	Whse. add	372	-	July 84	372	-	-	372
25. Speedway Moving	610 - 47th St. E.	May 17	Whse. add	1068	-	Aug. 84	1068	-	-	1068
26. Corman Investments	3062 Millar Ave.	May 23	Whse. new	557.44	51.08	Sept. 84	-	608.5	-	608.5
27. Corman Investments	3222 Millar Ave.	May 23	Whse. new	668.25	75	Sept. 84	-	743.25	-	743.25
28. Golden Trailer	2321 Faithful Ave.	May 28	Whse. add	206	-	Aug. 84	206	-	-	206
29. Mid West Development	602 Circle Drive	June 4	Whse. new	464	81.8	Sept. 84	-	150.6	395.2	545.8
30. McKee Moving	2412 Faithful Ave.	June 5	Whse. add	698	-	Sept. 84	698	-	-	698
31. M & N Holdings	418 - 47th St. E.	June 8	Whse. add	474	-	Sept. 84	-	474	-	474
32. Jarvie Holdings	4010 Thatcher Ave.	June 8	Whse. new	149	-	Sept. 84	149	-	-	149
33. Jarvie Holdings	4010 Thatcher Ave.	June 8	Whse. new	357	-	Sept. 84	357	-	-	357
34. Corman Investments	3234 Millar Ave.	June 22	Whse. new	551	60	Nov. 84	-	611	-	611
			TOTALS	31,696.45	3,012.41		15,916.77	17,256.7	1,535.33	34,708.8
			% of Total	91%	9%		45.9%	49.7%	4.4%	

FINGERTIP FACTS

LEADING INDUSTRIES

	Estimated Number of Employees
Manufacturing	8,000
Construction	4,500
Transportation, Communication & Other Utilities	10,500
Trade	17,000
Public Administration & Defence	10,000
Services	21,200
Other	4,600
TOTAL NUMBER OF JOBS	75,800

AGRICULTURE

Saskatoon is the distribution point for a rich high protein grain producing area. There are 18 merchant organizations, milling concerns, and a 5,500,000 bushel capacity grain storage elevator operated by Northern Sales Company Ltd.

IMPORTANT INDUSTRIES

Food Processing, Agricultural Machinery, Potash Mining, Metal Fabrication, Electronic Manufacturing, Garment Manufacturing, Building Materials, Industrial and Agricultural Chemicals.

NATURAL RESOURCES IN SASKATCHEWAN

Grain (ie. wheat, barley, oats), special crops (ie. rapeseed, mustard, alfalfa, flax), potash, oil, gas, salt, clay, sand, water, gravel, lumber, iron, uranium, copper, lead, zinc, sodium, sulphate, coal, gold, silver, nickel, peat moss.

POTASH

Discovered in 1954, potash brought a boom to the Saskatoon economy. There are 10 mines and mills located in Saskatchewan. During the 1960's some $400 million was spent developing the 6 mines which are within 70 miles/112 kilometers of Saskatoon. There are plans over the next 10 years for expansion by various mines in the Saskatoon area.

URANIUM

Northern Saskatchewan possesses some of the richest uranium deposits in the world. Three mines are in production, and four more are being considered. Saskatoon is the supply base for the Saskatchewan uranium industry; of the 12 uranium firms active in the province, 3 have established their head offices in Saskatoon..

OIL

Saskatoon is emerging as a service and distribution centre for the heavy oil industry, which starts 80 miles/128 kilometers west, and northwest of the City.

AVERAGE WEEKLY WAGES & SALARIES FOR MANUFACTURING — JANUARY 1984

National Average	$458.44
Saskatoon	$442.05

RETAIL TRADE

Number of Stores 1983	1190
Total Sales 1983	$1.041 billion

HOUSEHOLDS

June 1981 Census	56,875
April 1984 Planning Dept. estimate	68,500
Average number of people per household	2.5

VALUE OF BUILDING PERMITS

1970-79 (10 year period)	$ 989.4 million
1979-83 (5 year period)	$1,015.3 million
1983 (one year only)	$ 200.4 million

DWELLING UNITS CONSTRUCTED — Includes Apartment Units

1970-79 (10 year period)	21,194
1979-83 (5 year period)	13,937
1983 (one year only)	2,277

PROTECTIVE FORCES — 1984

City Police Force	321
Regular Fire Force	252

POPULATION

1981 Federal Census	154,210
April 1984 - Planning Dept. estimate	168,850

BUSINESS STATISTICS 1984

Financial Institutions & Branches	157
Retail and Service Establishments	2,788
Wholesale Establishments & Warehouses	451
Manufacturing Establishments	260
Business & Professional Offices	1,001

TELEPHONE COMMUNICATIONS — April 1984

Residential Telephones	98,728
Business Telephones	45,187

TRANSPORTATION

Internal — municipal transit system fleet of 124 buses travelling 15 lines to all parts of the City at 15 and 30 minute intervals.

External — Canadian National Railways, Canadian Pacific Railways, Greyhound Bus Lines, Saskatchewan Transportation Company, Air Canada, Norcanair, Pacific Western, Frontier Airlines, plus charter services by Wardair and CP Air. 93 Transport Companies.

INDUSTRIAL INCENTIVES

The provincial Departments of Economic Development and Trade, and Tourism and Small Business, offers programs and services to stimulate investment, promote trade, and assist smaller companies in manufacturing, processing, tourism, and research and development. Federally, the Industrial and Regional Development Program (IRDP) is administered by the Department of Regional Industrial Expansion's provincial office in Saskatoon.

NATURAL GAS

Supplied by the Saskatchewan Power Corporation

WATER SUPPLY

The South Saskatchewan River provides an unlimited high quality source. Water sold to consumers is treated for hardness reduction, chlorination and fluoridation. No restrictions are imposed on domestic volume.

ELECTRIC POWER

Saskatchewan Power Corporation maintains an integrated grid with installed generating capacity of 2253 megawatts. Electricity is just one of the power sources that allows Saskatchewan to supply any industry.

CLIMACTIC CONDITIONS

Altitude	1,580 feet/481.7 meters
Area	141.46 square kilometers
Climate	DRY
Precipitation	13.73 inches/348.8 mm annual average
Sunshine	2,441.3 hours annually
Wind	10.9 mph/17 km.p.m. annual average

MEDICAL CARE

Three hospitals accommodating 1200 in-patient beds located in different residential areas. Saskatchewan Hospital Service and Medical Care Insurance Plan provides coverage for medical and hospital services.

ETHNIC GROUPS (1981 CENSUS)

	% Total
British	38.7
German	14.9
Ukrainian	9.6
French	4.3
Scandinavian	3.8
Netherlands	2.3
Native Indian	2.3
Polish	1.9
Italian	.5
Multiple Origins	13.4
Other Single Origins	8.3

EDUCATION

Elementary Schools	73
High Schools	13
Business Colleges	3

University of Saskatchewan
Kelsey Institute of Applied Arts & Sciences
Saskatoon Region Community College
The Co-operative College of Canada
School for the Deaf
French School
School for Retarded Children

RELIGION

There are 126 churches of various denominations.

RECREATION

A variety of resorts are within easy driving distance of Saskatoon. Pike Lake Provincial Park, 22 mi./35 km; Blackstrap Provincial Park, 25 mi./40 km; Gardiner Dam Recreation Area, 80 mi./128 km. Of the total 35,000 acres comprising the City of Saskatoon, over 4,000 acres are devoted to parks, including a Wild Animal Zoo, 41 supervised summer playgrounds, 62 supervised winter Recreation centres, 8 youth centres, 1 suburban recreation complex, and 1 field house.

SPORTS

Saskatoon has 6 public and private golf courses; 6 indoor and 4 outdoor swimming pools; 10 indoor public skating and hockey rinks; 6 curling rinks; 6 bowling centres; 2 ski hills plus Mount Blackstrap Ski Resort. Sports activities include stock car and drag strip racing; intercity baseball; senior men's and women's softball; slow-pitch ball; junior and varsity football; and skeet-shooting. Saskatoon is also close to excellent migratory fowl, upland game bird, and big game hunting areas, as well as numerous lakes for fishing.

CULTURAL AND ENTERTAINMENT

The 2,000 seat Centennial Auditorium is located in the heart of Saskatoon. It provides modern facilities to accommodate touring shows, concerts, conferences, conventions and commercial events. Other Saskatoon attractions are the Saskatoon Symphony Orchestra, Saskatoon Summer Theatrical Company, Mendel Art Gallery plus 11 small commercial galleries, 7 theatre groups. The Western Development Museum presents early modern farm machines, vintage autos, house furnishings and the way of life of the western Canadian prairie homesteader. The Ukrainian Museum of Canada features many colourful displays. The Saskatoon Exhibition combines recreation, horse racing, trade shows, educational and cultural programs, and livestock shows and sales into its annual fair.